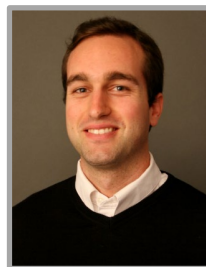




# SHP Dashboard Updates: Alert Management & PDGM Revenue



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Winning Wednesday Webinar Series

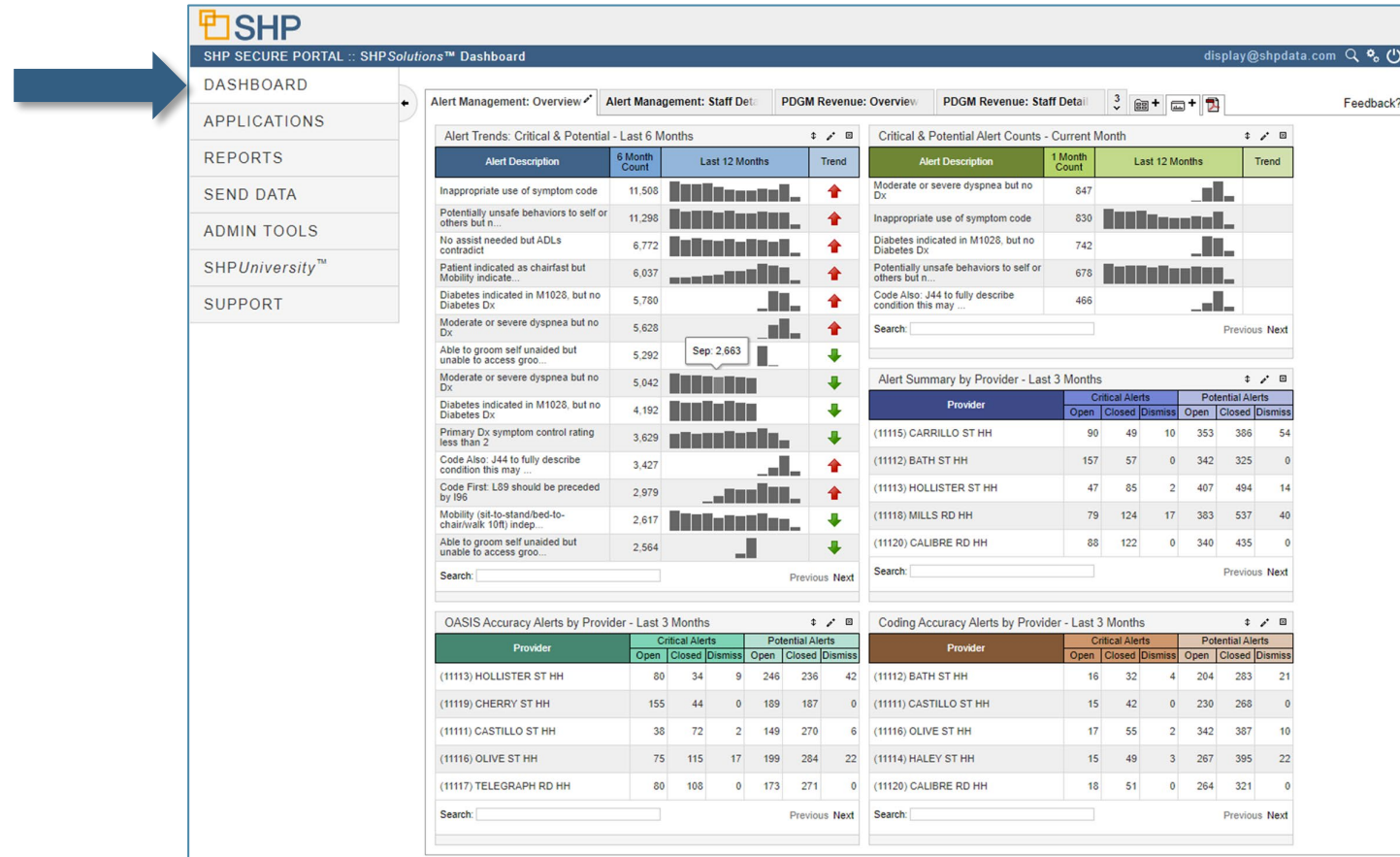
# Learning Objectives

- ✓ Overview of New Dashboard Tools
- ✓ Alert Management
  - *Introduction to New Widgets*
  - *The New Alert Impact Report*
  - *Use Cases*
- ✓ PDGM Revenue Review
  - *Introduction to New Widgets*
  - *Use Cases*



# Navigating to the Dashboard Features

- ▶ Log in to SHP ([www.shpdata.com](http://www.shpdata.com))
- ▶ Click on the **Dashboard** option on the menu, then select one of the new **views/tabs** which have been added to your personal Dashboard



The screenshot shows the SHP Secure Portal Dashboard. A blue arrow points to the 'DASHBOARD' menu item in the left sidebar. The dashboard content includes several data visualization components:

- Alert Trends: Critical & Potential - Last 6 Months**: A table with columns for Alert Description, 6 Month Count, Last 12 Months, and Trend. It lists various alert types such as 'Inappropriate use of symptom code' and 'Potentially unsafe behaviors to self or others but n...'. A callout box highlights 'Sep 2, 663' for the 'Able to groom self unaided but unable to access groo...' alert.
- Critical & Potential Alert Counts - Current Month**: A table with columns for Alert Description, 1 Month Count, Last 12 Months, and Trend. It lists alerts like 'Moderate or severe dyspnea but no Dx' and 'Inappropriate use of symptom code'.
- Alert Summary by Provider - Last 3 Months**: A table with columns for Provider, Critical Alerts (Open, Closed, Dismiss), and Potential Alerts (Open, Closed, Dismiss). It lists providers such as (11115) CARRILLO ST HH and (11112) BATH ST HH.
- OASIS Accuracy Alerts by Provider - Last 3 Months**: A table with columns for Provider, Critical Alerts (Open, Closed, Dismiss), and Potential Alerts (Open, Closed, Dismiss). It lists providers such as (11113) HOLLISTER ST HH and (11119) CHERRY ST HH.
- Coding Accuracy Alerts by Provider - Last 3 Months**: A table with columns for Provider, Critical Alerts (Open, Closed, Dismiss), and Potential Alerts (Open, Closed, Dismiss). It lists providers such as (11112) BATH ST HH and (11111) CASTILLO ST HH.



# Getting Started with the New Dashboard

## Preset Views Available

- ▶ SHP has created new preset Dashboard views to help get you started with these new tools
- ▶ These views were created in collaboration with our clients to address the most commonly requested use cases not already covered by our Dashboard

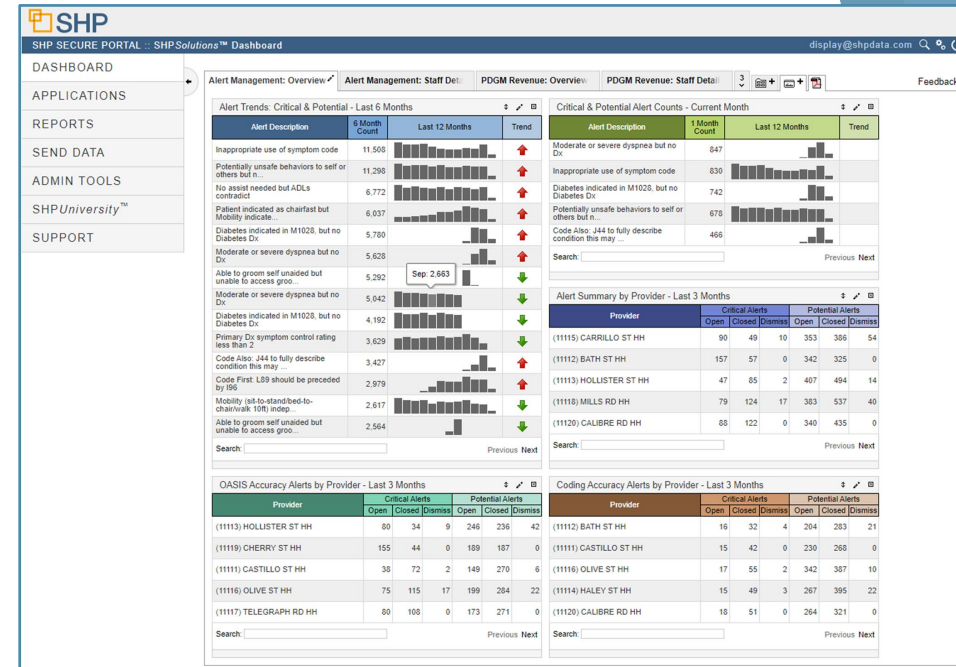
The screenshot displays the SHP Secure Portal Dashboard with the following sections:

- Navigation Menu:** DASHBOARD, APPLICATIONS, REPORTS, SEND DATA, ADMIN TOOLS, SHPUniversity™, SUPPORT.
- Alert Management: Overview** (Selected):
  - Alert Trends: Critical & Potential - Last 6 Months:** A table with columns for Alert Description, 6 Month Count, Last 12 Months (with a bar chart), and Trend. Alerts include 'Inappropriate use of symptom code' (11,508), 'Potentially unsafe behaviors to self or others but n...' (11,296), and others.
  - Critical & Potential Alert Counts - Current Month:** A table with columns for Alert Description, 1 Month Count, Last 12 Months (with a bar chart), and Trend. Alerts include 'Moderate or severe dyspnea but no Dx' (847), 'Inappropriate use of symptom code' (830), and others.
  - Alert Summary by Provider - Last 3 Months:** A table with columns for Provider, Critical Alerts (Open, Closed, Dismiss), and Potential Alerts (Open, Closed, Dismiss). Providers listed include (11115) CARRILLO ST HH, (11112) BATH ST HH, (11113) HOLLISTER ST HH, (11118) MILLS RD HH, and (11120) CALIBRE RD HH.
  - OASIS Accuracy Alerts by Provider - Last 3 Months:** A table with columns for Provider, Critical Alerts (Open, Closed, Dismiss), and Potential Alerts (Open, Closed, Dismiss). Providers listed include (11113) HOLLISTER ST HH, (11119) CHERRY ST HH, (11111) CASTILLO ST HH, (11116) OLIVE ST HH, and (11117) TELEGRAPH RD HH.
  - Coding Accuracy Alerts by Provider - Last 3 Months:** A table with columns for Provider, Critical Alerts (Open, Closed, Dismiss), and Potential Alerts (Open, Closed, Dismiss). Providers listed include (11112) BATH ST HH, (11111) CASTILLO ST HH, (11116) OLIVE ST HH, (11114) HALEY ST HH, and (11120) CALIBRE RD HH.

# Getting Started with the New Dashboard

## The New Preset Views Include:

- ▶ Alert Management: Staff Detail
- ▶ Alert Management: Overview
- ▶ PDGM Revenue: Staff Detail
- ▶ PDGM Revenue: Overview



# How to Add a New View or Widget

- ▶ Click on the “Add View” box to add a new view
- ▶ Click on the “Add Widget” box to add a widget to a view

**Alert Management: Overview** 14

**Add and Configure a New Widget**

Agencies: HCAHPS Hospice

**Choose a Widget Type**

- Care
  - 7. Scorecard: Process Measure(s) by Data Type
  - 8. 30-Day Hospital Readmissions
  - 9. Lowest Performing HHC Measures
- Financial**
  - 1. PDGM Revenue Overview
  - 2. Home Health Admissions & Discharges
- Staff Management
  - 1. Scorecard: Process Measure(s) by Data Type
- Alert Management**
  - 1. Alert Trends
  - 2. Alert Summary

**Step 1**  
Select a widget from the list at the left

**Step 2**  
Add the widget to your Dashboard with the default settings applied or  
— or —

**Step 3**  
Configure the widget with custom settings and add to your Dashboard

# Customizing Your Views and Widgets

- ▶ Click on the wand on each widget to configure the details

Alert Management: Overview 16 + + + Feedback?

Alert Trends: Critical & Potential - Last 3 Months ↕ ✎ ↻

| Alert Description | 6 Month Count | Last 12 Months | Trend |
|-------------------|---------------|----------------|-------|
|-------------------|---------------|----------------|-------|

Enterprise CASTILLO ST HH

**Title**  
Alert Trends: Critical & Potential - Last 6 Months

**Color**  
Blue Steel

**Date Range** ⓘ  
Last 6 Months

**Alert Type** ⓘ  
Unfiltered

**Notes**  
Select the set of alerts on which you want to report. Update the title of the widget based on your selections to avoid confusion.

Current month is included in Month Count, but excluded from Trend.  
Trend arrows are based on the linear score of the data in the selected time period: green arrows reflect a greater than 2 decrease in alert volume, red reflect a greater than 2 increase.

Save Cancel

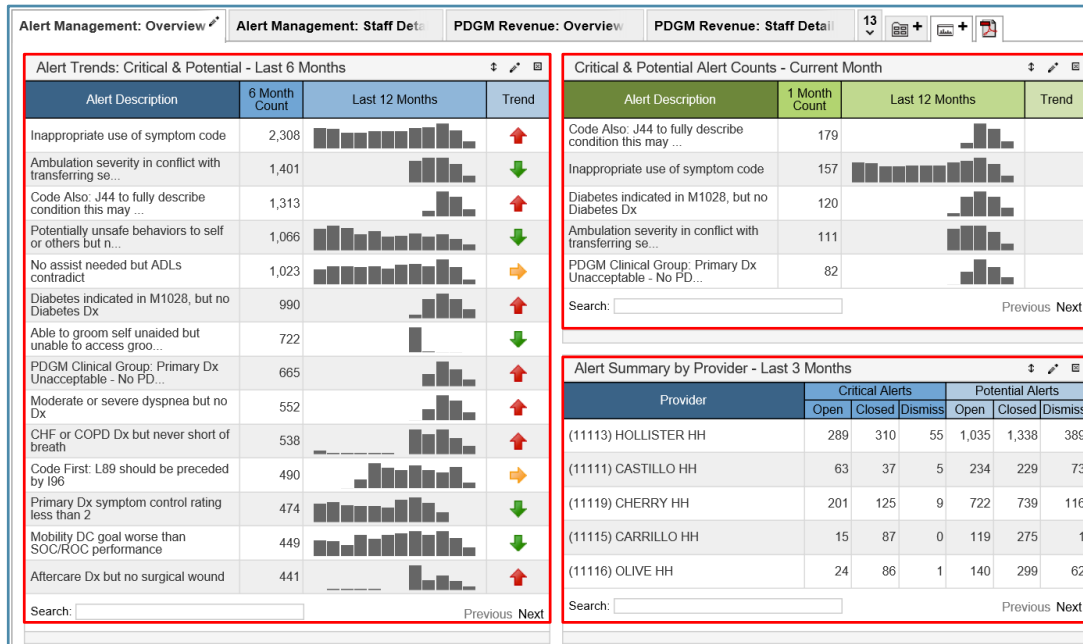
# Alert Management Views and Use Cases



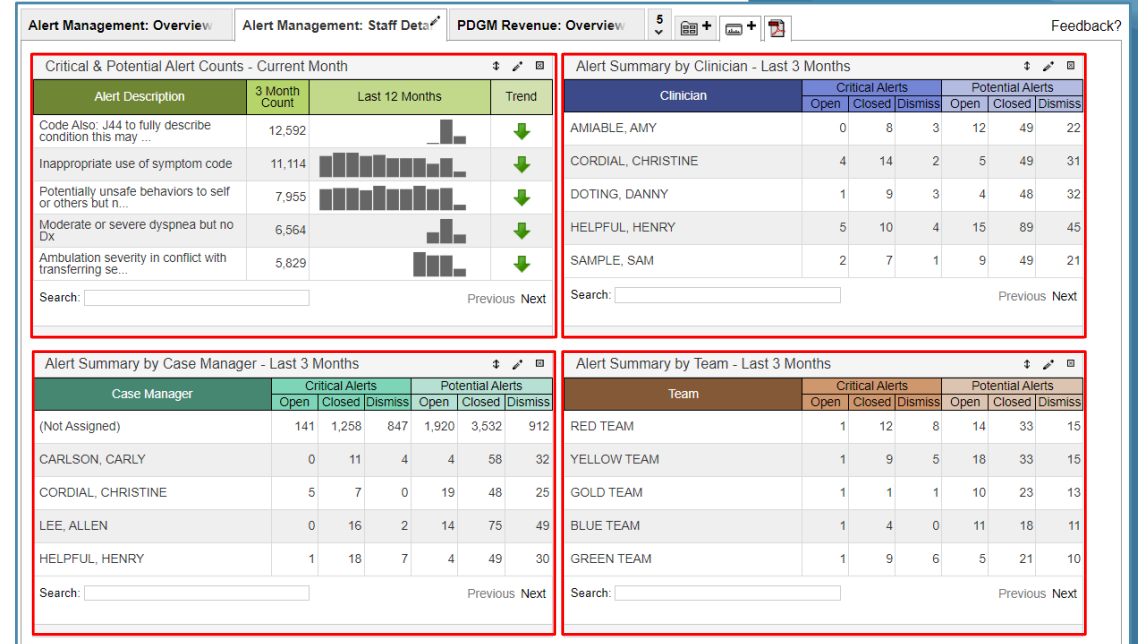
# New Alert Management Views

- The Default Views below are available to all SHP users

## Overview: High Level



## Staff Detail: Specific



# Color Coded Widgets to Stay Organized

**Color**

- Violet
- Navy
- Blue Steel
- Aqua
- Olive
- Umber
- Sienna
- Silver
- Magnum



Alert Summary by Provider - Last 3 Months

| Provider                | Critical Alerts |        |         | Potential Alerts |        |         |
|-------------------------|-----------------|--------|---------|------------------|--------|---------|
|                         | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11115) CARRILLO ST HH  | 90              | 49     | 10      | 353              | 386    | 54      |
| (11112) BATH ST HH      | 157             | 57     | 0       | 342              | 325    | 0       |
| (11113) HOLLISTER ST HH | 47              | 85     | 2       | 407              | 494    | 14      |
| (11118) MILLS RD HH     | 79              | 124    | 17      | 383              | 537    | 40      |
| (11120) CALIBRE RD HH   | 88              | 122    | 0       | 340              | 435    | 0       |

Search:  Previous Next

OASIS Accuracy Alerts by Provider - Last 3 Months

| Provider                | Critical Alerts |        |         | Potential Alerts |        |         |
|-------------------------|-----------------|--------|---------|------------------|--------|---------|
|                         | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11113) HOLLISTER ST HH | 80              | 34     | 9       | 246              | 236    | 42      |
| (11119) CHERRY ST HH    | 155             | 44     | 0       | 189              | 187    | 0       |
| (11111) CASTILLO ST HH  | 38              | 72     | 2       | 149              | 270    | 6       |
| (11116) OLIVE ST HH     | 75              | 115    | 17      | 199              | 284    | 22      |
| (11117) TELEGRAPH RD HH | 80              | 108    | 0       | 173              | 271    | 0       |

Search:  Previous Next

**Color**

- Olive
- Violet
- Navy
- Blue Steel
- Aqua
- Olive
- Umber
- Sienna
- Silver
- Magnum

Alert Summary by Case Manager - Last 3 Months

| Case Manager     | Critical Alerts |        |         | Potential Alerts |        |         |
|------------------|-----------------|--------|---------|------------------|--------|---------|
|                  | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| HELPFUL, HENRY   | 45              | 26     | 20      | 64               | 42     | 32      |
| SAMPLE, SAM      | 0               | 0      | 0       | 0                | 1      | 1       |
| KYLE, KEVIN      | 1               | 1      | 0       | 10               | 4      | 2       |
| CHAPLIN, CHARLIE | 2               | 3      | 0       | 3                | 11     | 0       |
| HOPEFUL, HELEN   | 1               | 22     | 0       | 8                | 70     | 0       |

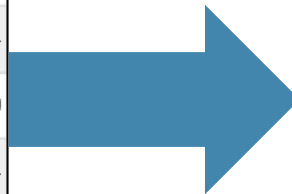
Search:  Previous Next

# Alert Management Customizations

- ▶ Within the widget customization box, select from a variety of options, including:
- ▶ Provider Level, Title, Color, Date Range, Alert Type, Alert Severity, Alert Status and Assessment Reason

| Alert Summary by Clinician - Last 3 Months |                 |        |         |                  |        |         |
|--|-----------------|--------|---------|------------------|--------|---------|
| Clinician                                  | Critical Alerts |        |         | Potential Alerts |        |         |
|  | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| AMIABLE, AMY                               | 24              | 3      | 0       | 14               | 31     | 2       |
| CORDIAL, CHRISTINE                         | 17              | 10     | 1       | 25               | 34     | 4       |
| KIND, KATRINA                              | 17              | 1      | 0       | 26               | 32     | 9       |
| LEONARD, LENNY                             | 16              | 2      | 0       | 24               | 27     | 4       |
| HELPFUL, HENRY                             | 14              | 10     | 0       | 42               | 44     | 3       |

Search:  Previous Next



| Alert Summary by Team - Last 3 Months |                 |        |         |                  |        |         |
|---------------------------------------|-----------------|--------|---------|------------------|--------|---------|
| Team                                  | Critical Alerts |        |         | Potential Alerts |        |         |
|                                       | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| GOLD TEAM                             | 11              | 18     | 1       | 62               | 48     | 18      |
| BLUE TEAM                             | 6               | 11     | 0       | 39               | 29     | 11      |
| YELLOW TEAM                           | 8               | 10     | 0       | 21               | 17     | 2       |
| ORANGE TEAM                           | 0               | 0      | 0       | 2                | 0      | 0       |
| CHARCOAL TEAM                         | 5               | 39     | 1       | 40               | 176    | 32      |

Search:  Previous Next

# Introducing the NEW Alert Impact Report!

**Alert Management: Overview** **PDGM Revenue: Overview**

Alert Trends: Critical & Potential - Last 3 Months

| Alert Description  | 6 Month Count | Last 12 M |
|--|---------------|-----------|
| Ambulation severity in conflict with transferring se...        | 1,114         |           |
| Code Also: J44 to fully describe condition this may ...        | 845           |           |
| Diabetes indicated in M1028, but no Diabetes Dx                | 715           |           |
| Able to groom self unaided but unable to access groo...        | 697           |           |
| <b>PDGM Clinical Group: Primary Dx Unacceptable - No PD...</b> |               |           |

**SHP Alert Impact**  
CASTILLO HOME HEALTH  
Report Date: MMDDYYYY

Critical Alert: PDGM Clinical Group: This ICD code is unacceptable for use as a primary diagnosis under PDGM. This code is not included in a PDGM Clinical Group and is not eligible for payment effective January 1, 2020.  
 Severity Filter: Critical & Potential  Alert Type Filter: Case Mix Accuracy

| Summary       | Total      | Open      | Closed     | Dismiss   |
|---------------|------------|-----------|------------|-----------|
| Critical      | 474        | 99        | 375        | 14        |
| Potential     | 0          | 0         | 0          | 0         |
| Informational | 0          | 0         | 0          | 0         |
| <b>Total</b>  | <b>474</b> | <b>99</b> | <b>375</b> | <b>14</b> |

| Provider            | Total | Open | Closed | Dismiss |
|---------------------|-------|------|--------|---------|
| (11111) CASTILLO HH | 103   | 50   | 53     | 5       |
| (11112) BATH HH     | 44    | 20   | 24     | 1       |
| (11120) CALIBRE HH  | 36    | 1    | 35     | 0       |
| (11114) HALEY HH    | 34    | 9    | 25     | 2       |
| (11116) OLIVE HH    | 30    | 0    | 30     | 0       |

| Clinician          | Total | Open | Closed | Dismiss |
|--------------------|-------|------|--------|---------|
| HELPPFUL, HENRY    | 17    | 1    | 16     | 0       |
| CORDIAL, CHRISTINE | 13    | 0    | 13     | 0       |
| SAMPLE, SAM        | 13    | 0    | 13     | 0       |
| HOPEFUL, HELEN     | 10    | 0    | 10     | 0       |
| CORAZON, KELLY     | 8     | 0    | 8      | 1       |

| Team        | Total | Open | Closed | Dismiss |
|-------------|-------|------|--------|---------|
| BLUE TEAM   | 28    | 2    | 26     | 0       |
| YELLOW TEAM | 21    | 14   | 7      | 0       |
| RED TEAM    | 20    | 1    | 19     | 0       |
| GOLD TEAM   | 20    | 3    | 17     | 0       |
| ORANGE TEAM | 16    | 0    | 16     | 3       |

| Case Manager       | Total | Open | Closed | Dismiss |
|--------------------|-------|------|--------|---------|
| (Not Assigned)     | 61    | 16   | 45     | 0       |
| DOTING, DANNY      | 10    | 10   | 0      | 0       |
| CORDIAL, CHRISTINE | 9     | 0    | 9      | 0       |
| AMIABLE, AMY       | 9     | 0    | 9      | 0       |
| HOPEFUL, HELEN     | 7     | 0    | 7      | 0       |

| Related Critical & Potential Alerts   | Total | Open | Closed | Dismiss |
|---|-------|------|--------|---------|
| Diabetes indicated in M1028, but no Diabetes Dx                                 | 82    | 18   | 64     | 3       |
| Ambulation severity in conflict with transferring severity                      | 99    | 9    | 80     | 12      |
| Moderate or severe dyspnea but no Dx  | 68    | 11   | 57     | 9       |
| Code Also: J44 to fully describe condition this may be accompanied by J45-      | 61    | 26   | 35     | 20      |
| Diabetes and PVD/PAD indicated in M1028, but no Dx Codes                        | 33    | 9    | 24     | 2       |
| Able to walk only with supervision but able to bathe self at chair/sink/commode | 22    | 8    | 14     | 4       |
| PDGM Comorbidity: Renal 1 - Non-specific Dx for chronic kidney disease          | 19    | 4    | 15     | 7       |
| Use Additional Code: E11.22 should be followed by N18.1 - N18.6                 | 18    | 12   | 6      | 2       |
| PVD or PAD indicated in M1028, but no PVD or PAD Dx                             | 17    | 2    | 15     | 2       |
| M1311 indicates pressure ulcer/injury but no Dx of pressure ulcer/injury        | 16    | 1    | 15     | 1       |



# Alert Impact Drill-Down Report

- ▶ Alert Impact Detail report with filters applied
- ▶ Summary Section
- ▶ Trend Section

**SHP Alert Impact**  
CASTILLO HOME HEALTH

MM/DD/YYYY - MM/DD/YYYY  
Report Date: MM/DD/YYYY

**Summary**

|               | Total      | Open      | Closed     | Dismiss   |
|---------------|------------|-----------|------------|-----------|
| Critical      | 474        | 99        | 375        | 14        |
| Potential     | 0          | 0         | 0          | 0         |
| Informational | 0          | 0         | 0          | 0         |
| <b>Total</b>  | <b>474</b> | <b>99</b> | <b>375</b> | <b>14</b> |

**Trend Section**

| Provider        | Total | Open | Closed | Dismiss |
|-----------------|-------|------|--------|---------|
| 11111 CASTILLO  | 100   | 50   | 50     | 0       |
| 11112 BETHANY   | 44    | 20   | 24     | 0       |
| 11113 CALLES-AM | 30    | 1    | 29     | 0       |
| 11114 HALEY-HE  | 24    | 9    | 15     | 0       |
| 11115 OLIVE-HE  | 30    | 0    | 30     | 0       |

**Team**

| Team         | Total | Open | Closed | Dismiss |
|--------------|-------|------|--------|---------|
| BULL TEAM    | 26    | 2    | 24     | 0       |
| BULLDOG TEAM | 21    | 4    | 17     | 0       |
| RED TEAM     | 20    | 1    | 19     | 0       |
| BOLD TEAM    | 20    | 3    | 17     | 0       |
| ORANGE TEAM  | 16    | 0    | 16     | 0       |

**Detail Critical & Potential Alerts**

|  | Total | Open | Closed | Dismiss |
|--|-------|------|--------|---------|
| ⚠ Disease Inclusion in ICD10, but no Disease Di                                | 10    | 10   | 0      | 0       |
| ⚠ Attribution severity in conflict with transferity severity                   | 10    | 0    | 10     | 0       |
| ⚠ Makers or reverse transfer but no Di   | 60    | 11   | 47     | 0       |
| ⚠ Code Also Use is fully decible condition this may be accompanied by JET-     | 01    | 20   | 16     | 0       |
| ⚠ Disease and PCD/PCD Inclusion in ICD10, but no Di Code                       | 33    | 0    | 24     | 0       |
| ⚠ Able to walk only with supervision but able to bath self at patient/roommate | 22    | 0    | 14     | 0       |
| ⚠ PDGM Category: Rural 1 - Non-specific Di for chronic kidney disease          | 19    | 4    | 15     | 0       |
| ⚠ Use Additional Code: E11.22 should be followed by I10.1 - I10.9              | 10    | 12   | 0      | 0       |
| ⚠ PVD or PAD Inclusion in ICD10, but no PVD or PAD Di                          | 17    | 2    | 15     | 0       |
| ⚠ I10.11 Inclusion pressure identifier but no Di of pressure identifier        | 16    | 1    | 15     | 0       |

## Alert Impact

CASTILLO HOME HEALTH

MM/DD/YYYY - MM/DD/YYYY

Report Date: MM/DD/YYYY

**[X] Critical Alert:** PDGM Clinical Group: This ICD code is unacceptable for use as a primary diagnosis under PDGM. This code is not included in a PDGM Clinical Group and is not eligible for payment effective January 1, 2020.

**[X] Severity Filter:** Critical & Potential    **[X] Alert Type Filter:** Case Mix Accuracy

| Summary       | Total | Open | Closed | Dismiss |
|---------------|-------|------|--------|---------|
| Critical      | 474   | 99   | 375    | 14      |
| Potential     | 0     | 0    | 0      | 0       |
| Informational | 0     | 0    | 0      | 0       |
| Total         | 474   | 99   | 375    | 14      |

Legend: Total (Orange Bar), Open (Solid Blue Line), Closed (Dashed Blue Line), Dismissed (Dotted Blue Line)

# Alert Impact Drill-Down Report (Cont'd)

- Groupings for the Providers, Clinicians, Teams and Case Managers associated with the Selected Alert or Alert Category

| Provider            | Total | Open | Closed | Dismiss |
|---------------------|-------|------|--------|---------|
| (11111) CASTILLO HH | 103   | 50   | 53     | 5       |
| (11112) BATH HH     | 44    | 20   | 24     | 1       |
| (11120) CALIBRE HH  | 36    | 1    | 35     | 0       |
| (11114) HALEY HH    | 34    | 9    | 25     | 2       |
| (11116) OLIVE HH    | 30    | 0    | 30     | 0       |

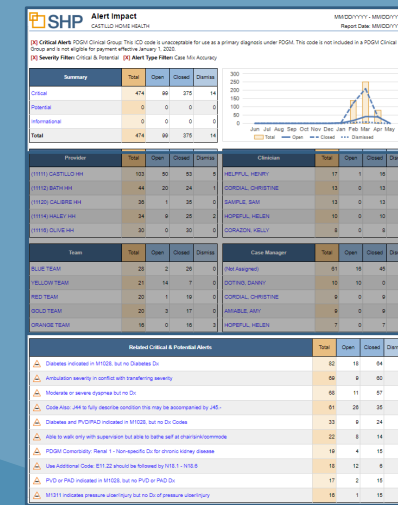
| Clinician          | Total | Open | Closed | Dismiss |
|--------------------|-------|------|--------|---------|
| HELPFUL, HENRY     | 17    | 1    | 16     | 0       |
| CORDIAL, CHRISTINE | 13    | 0    | 13     | 0       |
| SAMPLE, SAM        | 13    | 0    | 13     | 0       |
| HOPEFUL, HELEN     | 10    | 0    | 10     | 0       |
| CORAZON, KELLY     | 8     | 0    | 8      | 1       |

| Team        | Total | Open | Closed | Dismiss |
|-------------|-------|------|--------|---------|
| BLUE TEAM   | 28    | 2    | 26     | 0       |
| YELLOW TEAM | 21    | 14   | 7      | 0       |
| RED TEAM    | 20    | 1    | 19     | 0       |
| GOLD TEAM   | 20    | 3    | 17     | 0       |
| ORANGE TEAM | 16    | 0    | 16     | 3       |

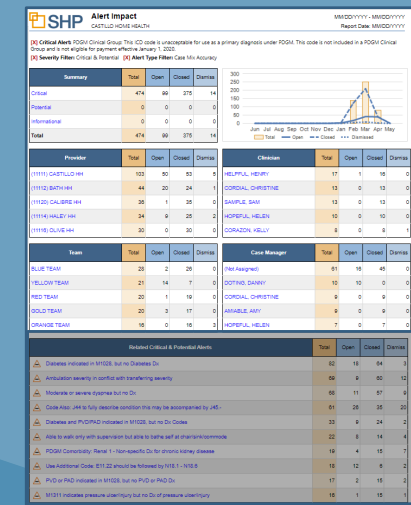
| Case Manager       | Total | Open | Closed | Dismiss |
|--------------------|-------|------|--------|---------|
| (Not Assigned)     | 61    | 16   | 45     | 0       |
| DOTING, DANNY      | 10    | 10   | 0      | 0       |
| CORDIAL, CHRISTINE | 9     | 0    | 9      | 0       |
| AMIABLE, AMY       | 9     | 0    | 9      | 0       |
| HOPEFUL, HELEN     | 7     | 0    | 7      | 0       |



# Alert Impact Drill-Down Report (Cont'd)

- ▶ The “Related Critical and Potential Alerts” section shows the alerts that showed up the most frequently when the selected alert was also present

| Related Critical & Potential Alerts   | Total | Open | Closed | Dismiss |
|---|-------|------|--------|---------|
| ⚠ Diabetes indicated in M1028, but no Diabetes Dx                                 | 82    | 18   | 64     | 3       |
| ⚠ Ambulation severity in conflict with transferring severity                      | 69    | 9    | 60     | 12      |
| ⚠ Moderate or severe dyspnea but no Dx  | 68    | 11   | 57     | 9       |
| ⚠ Code Also: J44 to fully describe condition this may be accompanied by J45.-     | 61    | 26   | 35     | 20      |
| ⚠ Diabetes and PVD/PAD indicated in M1028, but no Dx Codes                        | 33    | 9    | 24     | 2       |
| ⚠ Able to walk only with supervision but able to bathe self at chair/sink/commode | 22    | 8    | 14     | 4       |
| ⚠ PDGM Comorbidity: Renal 1 - Non-specific Dx for chronic kidney disease          | 19    | 4    | 15     | 7       |
| ⚠ Use Additional Code: E11.22 should be followed by N18.1 - N18.6                 | 18    | 12   | 6      | 2       |
| ⚠ PVD or PAD indicated in M1028, but no PVD or PAD Dx                             | 17    | 2    | 15     | 2       |
| ⚠ M1311 indicates pressure ulcer/injury but no Dx of pressure ulcer/injury        | 16    | 1    | 15     | 1       |



# Saved Views in the Alert Manager

- ▶ If there is an alert category that you would like to monitor, reach out to your SHP Customer Manager to set up a “Saved View” that shows patient detail data for a specified alert

Viewing Data: **Castillo Home Health** May 20 01:06 AM (4 Alert(s) for 11111)

Providers: Enterprise | Castillo Home Health

Manage By: E-mail Alerts | Apr 15 01:06 AM (4 Alert(s) for 36789)

Alert Status: All

Options: Reset Default Options

Resources | My Views

Group by: Clinician

Total Open Alerts in Results: 4

| Clinician >> Assessment >> Alert | + All | 🕒 | \$ | ⚠️ | Status | 📄 | ↕ | Open | ↕ | Closed |
|----------------------------------|-------|---|----|----|--------|---|---|------|---|--------|
| ▶ AMIABLE, AMY                   |       |   | \$ |    |        |   |   | 3    |   | 0      |
| ▶ HELPFUL, HELEN                 |       |   | \$ |    |        |   |   | 1    |   | 0      |



# Alert Management Use Case #1

- ▶ How can I review only my Open Critical and Potential Alerts?
- ▶ Steps to achieve the results
  - 1) Navigate to or add the Alert Management: Overview (for a high level view) or the Alert Management: Staff Detail (for a Granular view)
  - 2) “Alert Summary by...” Provider, Clinician, Case Manager, Team, etc.
  - 3) Click on the “Open” header at the top of the column under Critical or Potential to sort in descending order

| Alert Summary by Provider - Last 3 Months |                 |        |         |                  |        |         |
|---|-----------------|--------|---------|------------------|--------|---------|
| Provider                                  | Critical Alerts |        |         | Potential Alerts |        |         |
|   | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11117) OLIVER HH                         | 276             | 295    | 51      | 1,011            | 1,283  | 373     |
| (11114) CHERRY HH                         | 198             | 124    | 8       | 696              | 727    | 111     |
| (11119) TELEGRAPH HH                      | 53              | 37     | 5       | 222              | 219    | 68      |
| (11120) BELFAST HH                        | 52              | 97     | 40      | 219              | 487    | 264     |
| (11130) ORANGE HH                         | 25              | 65     | 5       | 90               | 307    | 79      |

Search:  Previous Next

# Alert Management Use Case #2

▶ What are my most common alerts in the last 6 months?

▶ Steps to achieve the results

- 1) Navigate to or add the Alert Management: Overview (for a high level view) or the Alert Management: Staff Detail (for a Granular view)
- 2) Review “Alert Trends: Critical & Potential – Last 6 Months”. Under the “6 Month Count” column, you will be able to see the most frequent alerts for the level of the organization you’ve been granted access

| Alert Management: Overview                              |               | Alert Management: Staff Data |  | PDGM Revenue: |  |
|---|---------------|------------------------------|--|---------------|--|
| Alert Trends: Critical & Potential - Last 6 Months      |               |                              |  |               |  |
| Alert Description                                       | 6 Month Count | Last 12 Months               |  | Trend         |  |
| Inappropriate use of symptom code                       | 2,288         |                              |  | ↑             |  |
| Ambulation severity in conflict with transferring se... | 1,380         |                              |  | ↓             |  |
| Code Also: J44 to fully describe condition this may ... | 1,288         |                              |  | ↑             |  |
| Potentially unsafe behaviors to self or others but n... | 1,060         |                              |  | ↓             |  |
| No assist needed but ADLs contradict                    | 1,003         |                              |  | →             |  |
| Diabetes indicated in M1028, but no Diabetes Dx         | 978           |                              |  | ↑             |  |
| Able to groom self unaided but unable to access groo... | 715           |                              |  | ↓             |  |
| PDGM Clinical Group: Primary Dx Unacceptable - No PD... | 658           |                              |  | ↑             |  |

# PDGM Revenue Views and Use Cases

# New PDGM Revenue Views

## ► PDGM Revenue – Overview and Staff Detail

### Overview:

| PDGM Revenue by Provider - Last 6 Months |          |         |       |               |                   |                  |
|--|----------|---------|-------|---------------|-------------------|------------------|
| Provider                                 | Period # | Case Wt |       | Total Payment | Potential Revenue | Realized Revenue |
|  |          | Early   | Late  |               |                   |                  |
| (11111) CASTILLO HH                      | 2,886    | 1,281   | 0,810 | \$4.9M        | \$39,385          | \$30,323         |
| (11113) HOLLISTER HH                     | 1,873    | 1,321   | 0,830 | \$3.2M        | \$29,334          | \$36,102         |
| (11115) CARRILLO HH                      | 607      | 1,309   | 0,815 | \$967K        | \$12,344          | \$7,834          |
| (11116) OLIVE HH                         | 837      | 1,419   | 0,835 | \$1.4M        | \$7,823           | \$31,350         |
| (11119) CHERRY HH                        | 715      | 1,336   | 0,866 | \$1.3M        | \$5,863           | \$16,237         |
| (11114) HALEY HH                         | 798      | 1,309   | 0,801 | \$1.2M        | \$4,625           | \$8,249          |
| (11118) MILLS HH                         | 309      | 1,320   | 0,796 | \$515K        | \$4,479           | \$7,620          |
| (11117) TELEGRAPH HH                     | 499      | 1,400   | 0,879 | \$881K        | \$4,323           | \$24,576         |
| (11120) ASHWOOD HH                       | 490      | 1,388   | 0,894 | \$861K        | \$4,083           | \$21,004         |
| (11127) BALBOA HH                        | 297      | 1,392   | 0,882 | \$496K        | \$3,916           | \$11,509         |
| (11130) BELFAST HH                       | 421      | 1,311   | 0,865 | \$778K        | \$3,801           | \$21,497         |
| (11124) CAMPUS HH                        | 466      | 1,352   | 0,855 | \$809K        | \$3,644           | \$16,335         |
| (11125) CASITAS HH                       | 458      | 1,375   | 0,849 | \$826K        | \$3,626           | \$14,583         |
| (11123) CENTRAL HH                       | 444      | 1,291   | 0,824 | \$749K        | \$3,265           | \$11,028         |

| Case Mix Alerts by Provider - Last 3 Months |                 |        |         |                  |        |         |
|---|-----------------|--------|---------|------------------|--------|---------|
| Provider                                    | Critical Alerts |        |         | Potential Alerts |        |         |
|   | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11111) CASTILLO HH                         | 96              | 85     | 14      | 387              | 304    | 89      |
| (11116) OLIVE HH                            | 16              | 6      | 0       | 82               | 50     | 10      |
| (11118) MILLS HH                            | 52              | 40     | 2       | 246              | 199    | 16      |
| (11117) TELEGRAPH HH                        | 6               | 20     | 0       | 33               | 93     | 0       |
| (11119) CHERRY HH                           | 5               | 29     | 0       | 41               | 113    | 26      |

| PDGM Revenue by Admit Src & Timing - Last 3 Months |          |         |       |               |                   |                  |
|--|----------|---------|-------|---------------|-------------------|------------------|
| Admit Source & Timing                              | Period # | Case Wt |       | Total Payment | Potential Revenue | Realized Revenue |
|  |          | Early   | Late  |               |                   |                  |
| Late - Community                                   | 1,888    |         | 0,821 | \$2.6M        | \$23,781          | \$51,791         |
| Early - Institutional                              | 610      | 1,409   |       | \$1.4M        | \$9,785           | \$24,096         |
| Early - Community                                  | 201      | 1,243   |       | \$407K        | \$4,080           | \$5,139          |
| Late - Institutional                               | 96       |         | 1,301 | \$210K        | \$595             | \$4,231          |
| (Not Assigned)                                     | 34       |         |       |               |                   |                  |

### Staff Detail:

| Case Mix Alerts by Provider - Last 3 Months |                 |        |         |                  |        |         |
|---|-----------------|--------|---------|------------------|--------|---------|
| Provider                                    | Critical Alerts |        |         | Potential Alerts |        |         |
|   | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11111) CASTILLO HH                         | 96              | 85     | 14      | 387              | 304    | 89      |
| (11115) CARRILLO HH                         | 16              | 6      | 0       | 82               | 50     | 10      |
| (11119) CHERRY HH                           | 52              | 40     | 2       | 246              | 199    | 16      |
| (11118) MILLS HH                            | 6               | 20     | 0       | 33               | 93     | 0       |
| (11130) BELFAST HH                          | 5               | 29     | 0       | 41               | 113    | 26      |

| PDGM Revenue by Provider - Last 6 Months |          |         |       |               |                   |                  |
|--|----------|---------|-------|---------------|-------------------|------------------|
| Clinician                                | Period # | Case Wt |       | Total Payment | Potential Revenue | Realized Revenue |
|  |          | Early   | Late  |               |                   |                  |
| CARLSON, CARLY                           | 91       | 1,403   | 0,912 | \$177K        | \$1,994           | \$8,682          |
| DOTING, DANNY                            | 52       | 1,392   | 0,963 | \$108K        | \$1,965           | \$4,098          |
| CARA, SUZANNE                            | 52       | 1,364   | 0,865 | \$83,559      | \$1,861           | \$1,106          |
| LYNN, JENNIFER                           | 25       | 1,213   | 0,719 | \$35,139      | \$1,563           | \$0              |
| HELPLEFUL, HENRY                         | 36       | 1,375   | 0,859 | \$57,640      | \$1,498           | \$1,908          |

| PDGM Revenue by Clinician - Last 3 Months |          |         |       |               |                   |                  |
|---|----------|---------|-------|---------------|-------------------|------------------|
| Clinician                                 | Period # | Case Wt |       | Total Payment | Potential Revenue | Realized Revenue |
|   |          | Early   | Late  |               |                   |                  |
| AMIALE, AMY                               | 21       | 1,213   | 0,719 | \$26,885      | \$1,563           | \$0              |
| CARLSON, CARLY                            | 46       | 1,411   | 0,928 | \$84,526      | \$1,514           | \$3,079          |
| LEE, ALLEN                                | 20       | 1,362   | 0,810 | \$27,234      | \$1,232           | \$905            |
| HELPLEFUL, HENRY                          | 41       | 1,228   | 0,832 | \$62,903      | \$1,073           | \$2,224          |
| SAMPLE, SAM                               | 36       | 1,183   | 0,782 | \$54,406      | \$1,001           | \$694            |

| PDGM Revenue by Case Manager - Last 3 Months |          |         |       |               |                   |                  |
|--|----------|---------|-------|---------------|-------------------|------------------|
| Case Manager                                 | Period # | Case Wt |       | Total Payment | Potential Revenue | Realized Revenue |
|  |          | Early   | Late  |               |                   |                  |
| (Not Assigned)                               | 420      | 1,379   | 0,927 | \$702K        | \$6,146           | \$16,758         |
| CARLSON, CARLY                               | 24       | 1,316   | 0,782 | \$33,345      | \$1,727           | \$0              |
| CORDIAL, CHRISTINE                           | 43       | 1,414   | 0,879 | \$71,245      | \$1,093           | \$1,420          |
| LEE, ALLEN                                   | 30       | 1,382   | 0,840 | \$43,906      | \$973             | \$77             |
| SAMPLE, SAM                                  | 21       | 1,335   | 0,884 | \$38,971      | \$969             | \$1,071          |

# PDGM Revenue Use Case #1

- ▶ Which Clinicians/Case Managers have the highest Potential or Realized Revenue associated with their patients?

| PDGM Revenue by Clinician - Last 3 Months |          |         |       |               |                   |                  |
|---|----------|---------|-------|---------------|-------------------|------------------|
| Clinician                                 | Period # | Case Wt |       | Total Payment | Potential Revenue | Realized Revenue |
|   |          | Early   | Late  |               |                   |                  |
| Amiable, Amy                              | 134      | 1.383   | 0.947 | \$234K        | \$1,856           | \$4,240          |
| Helpful, Henry                            | 236      | 1.488   | 0.946 | \$431K        | \$1,694           | \$4,394          |
| Cordial, Christine                        | 52       | 1.428   | 0.967 | \$170K        | \$1,618           | \$1,288          |
| Sample, Sam                               | 69       | 1.350   | 0.937 | \$155K        | \$1,534           | \$0              |
| Doting, Danny                             | 83       | 1.369   | 0.916 | \$111K        | \$1,497           | \$1,909          |

Search:  Previous Next

# PDGM Revenue Use Case #2

- ▶ How do I configure the PDGM Revenue widget for different groups of Providers, Regions, Clinicians, etc?

**Alert Management: Overview** 16 Feedback?

**Add and Configure a New Widget**

Agencies **HHCAPHS** Hospice

**Choose a Widget Type**

- Care
  - 7. Scorecard: Process Measure(s) by Data Type
  - 8. 30-Day Hospital Readmissions
  - 9. Lowest Performing HHC Measures
- Financial**
  - 1. **PDGM Revenue Overview**
  - 2. Home Health Admissions & Discharges
- Staff Management
  - 1. Scorecard: Process Measure(s) by Data Type
- Alert Management
  - 1. Alert Trends
  - 2. Alert Summary

**Step 1**  
Select a widget from the list at the left

**Step 2**  
Add the widget to your Dashboard with the default settings applied or  
— or —

**Step 3**  
Configure the widget with custom settings and add to your Dashboard

Alert Trends: C **Trend**

# PDGM Revenue Use Case #2 (Cont'd)

- ▶ You can use the same widget for reporting on different provider groupings in your organization

Alert Summary by Provider **North Division** - Last 3 Months

| Provider             | Critical Alerts |        |         | Potential Alerts |        |         |
|----------------------|-----------------|--------|---------|------------------|--------|---------|
|                      | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11117) OLIVER HH    | 178             | 310    | 55      | 1,035            | 1,338  | 389     |
| (11114) CHERRY HH    | 63              | 37     | 5       | 234              | 229    | 73      |
| (11119) TELEGRAPH HH | 180             | 125    | 9       | 722              | 739    | 116     |
| (11120) BELFAST HH   | 15              | 87     | 0       | 119              | 275    | 1       |
| (11130) ORANGE HH    | 24              | 86     | 1       | 140              | 299    | 62      |

Search:  Previous Next



Alert Summary by Provider **East Division** - Last 3 Months

| Provider             | Critical Alerts |        |         | Potential Alerts |        |         |
|----------------------|-----------------|--------|---------|------------------|--------|---------|
|                      | Open            | Closed | Dismiss | Open             | Closed | Dismiss |
| (11116) IVY HH       | 180             | 302    | 52      | 900              | 1,305  | 381     |
| (11122) BORDER HH    | 176             | 37     | 5       | 225              | 229    | 73      |
| (11128) SPRINGBOK HH | 170             | 124    | 8       | 602              | 730    | 112     |
| (11127) ELAND HH     | 80              | 87     | 0       | 116              | 270    | 1       |
| (11130) BLUE SKY HH  | 75              | 86     | 1       | 132              | 298    | 61      |

Search:  Previous Next

|                 |               |
|-----------------|---------------|
| Enterprise      | East Division |
| <b>Division</b> |               |
| Region          |               |
| CCN             |               |
| Provider        |               |

Notes

# Practical Application of the Dashboard

- ▶ Spot the areas of importance across the enterprise
- ▶ Configure the Dashboard according to your needs
- ▶ New Dashboard widgets will allow you to stay on top of your most urgent opportunities for improvement





# Questions for Internal Discussion

- ▶ Which Measures are Our Focus?
- ▶ How are We Doing with Assessing Our Performance?
- ▶ Which Case Managers are Our Top Performers?
- ▶ Do We Have Members of the Team Who Need Additional Training?
- ▶ Are We Meeting Our Long-Term Goals?
- ▶ How Will We Share This Information with Our Stakeholders?
- ▶ Do We Need More Training for SHP?

# Use Case Questions Answered

Documents demonstrating how to use the Dashboard for the use cases below have been created and are attached to the Webinar as handouts:

- ▶ Alert Management: How can I review my open Critical and Potential alerts?
- ▶ Alert Management: What are my most common alerts in the last 6 months?
- ▶ PDGM: What clinician(s)/staff grouping(s) have the highest potential and realized revenue?
- ▶ All: What if I need to have multiple versions of the same view for different regions, or individual providers within my enterprise?
- ▶ Additional use case documents will be added as we obtain feedback and input from our users

# Conclusion

# Other New Resources

- ▶ **COVID-19:** SHP has released a number of specific COVID-19 report updates to help your organization deal with the changes resulting from this pandemic
- ▶ **Client Data Export:** If you're looking for additional analytics tools for Alert Management and PDGM, several new exports have been added the Client Data Export (CDE) tool
- ▶ **New Scorecard Widget:** This summer we will be adding a new Scorecard widget, stay tuned!

## CLIENT DATA EXPORT

### ▼ Agencies

→ Alerts - Aggregate

→ Clinical Measures - Aggregate

→ Clinical Measures - Benchmark

→ Clinical Measures - Detail

→ HH Stay - Aggregate

→ HH Stay - Benchmark

→ HH Stay - Detail

→ OASIS Assessment - Detail

→ Payment Episodes - Aggregate

→ Payment Episodes -  
Benchmark

→ Payment Episodes - Detail

→ PDGM Period Measures -  
Aggregate by Period

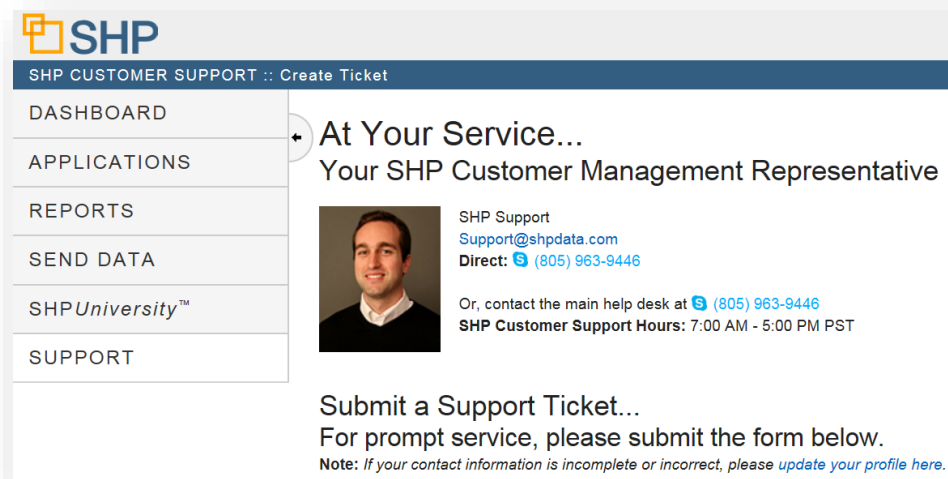
→ PDGM Period Measures -  
Detail by Patient

→ PDGM Stay Measures -  
Aggregate by Stay

→ PDGM Stay Measures - Detail  
by Patient

# We'd Love to Hear from You!


- ▶ As you begin using the Dashboard, let us know if you have use cases you've found valuable as you custom configure your widgets
- ▶ As always, don't hesitate to contact your SHP Customer Manager or our Support department with any questions or if you would like additional live training



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For prompt service, please submit the form below.  
*Note: If your contact information is incomplete or incorrect, please [update your profile here](#).*





STRATEGIC HEALTHCARE PROGRAMS

# Thank you for attending!

Questions? Please Contact Us At:

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